

Chapter 17


FRS FORMS

Chapter 17 Contents:

I. Administrative Forms	17-2
II. Forms of the Bureau of Enrollment and Contributions	17-2
III. Forms of the Bureau of Retirement Calculations	17-4
IV. Forms of the Bureau of Benefit Payments.....	17-6
A. Disability Determination	17-6
B. Survivor Benefits	17-7
C. Retired Payroll	17-9
D. DROP Termination and Refund Payment	17-10
V. FRS Investment Plan Forms	17-11


This chapter lists the forms used by the Division of Retirement. To obtain copies of most of the forms listed in this chapter, please contact the division to request the form or forms you need. You may call the division toll-free at 877-377-1266 or 850-907-6540, or email enrollment@dms.fl.gov. (Investment Plan forms listed exclusively on Page 17-11 are available online.)

Forms Published Online

A number of the forms listed in this chapter are also available on the division's Internet website at frs.myflorida.com or from the joint website of the division and the State Board of Administration at: MyFRS.com (select the Resources Tab). Forms available on the Internet are indicated by the symbol .












NOTE: Completed forms may be mailed or faxed to the division. If you fax us a signed and/or notarized form you must retain the original form. You do not need to mail the original to us, unless requested.

I. ADMINISTRATIVE FORMS














Form Number	Title/Subject of Form
SAPS	Florida Retirement System Statement Attesting to Payee Status
[none]	Publications Request Form 










II. FORMS OF THE BUREAU OF ENROLLMENT AND CONTRIBUTIONS

Form Number	Title/Subject of Form
BEN-001	FRS Pension Plan Beneficiary Designation Form (Active Members Only) [Note: Not for DROP participants] 
BLE-1	FRS Pension Plan Ballot for Member of an Existing Retirement System
CERT	New Employee Certification Form 
ELE-1-EZ	Florida Retirement System EZ Retirement Plan Enrollment Form for Regular, Special Risk and Special Risk Administrative Support Class Employees 
ELE-2-EZ	Florida Retirement System 2nd Election EZ Retirement Plan Enrollment Form 
ELE-1	Florida Retirement System GENERAL Retirement Plan Enrollment Form for Regular, Special Risk and Special Risk Administrative Support Class Employees 
ELE-2	Florida Retirement System 2nd Election Retirement Plan Enrollment Form 
EOC-1	Florida Retirement System Elected Officers' Class Employees Retirement Plan Enrollment Form 
ERQ-1	FRS Pension Plan Employment Relationship Questionnaire
FRS-400	Application for Special Risk Membership  Law Enforcement/Correctional Officers
FRS-401	FRS Pension Plan Special Risk Credit for Past Service 
FRS-402	FRS Pension Plan Application for Special Risk Equivalent Credit 
FRS-404	Florida Retirement System Application for Special Risk Administrative Support Class 

- FRS-405 Florida Retirement System
Application for Special Risk Membership
Firefighters/Paramedics/EMTs 
- FRS-410 Florida Retirement System
Application for Special Risk Class Membership - Forensic Discipline
from October 2005 through June 2008
- FRS-415 Florida Retirement System
Application for Special Risk Class Membership - Forensic Discipline
Effective July 1, 2008 
- OCC-1 Florida Retirement System
Ballot/Enrollment Form for State Community College
System Optional Retirement Program Employees 
- OCC-2 Florida Retirement System
Retirement Plan Conversion Form for State Community College
System Optional Retirement Program (SCCSORP) Members 
- [Online] Florida Retirement System
FRS Contributions Summary : (Retirement/HIS)  only
- [Online] Florida Retirement System
Optional Annuity Program Contributions Summary  only
- [Online] Florida Retirement System
Optional Retirement Program (ORP/IFAS) Contributions Summary  only
- ORP-16 Florida Retirement System
State University System Optional Retirement Program (SUSORP)
FRS Ballot 
- ORP-16A Florida Retirement System
State University System Optional Retirement Program (SUSORP)
Change Form 
- SMS-3 Florida Retirement System
Local Senior Management Service Employees
Retirement Plan Enrollment Form 
- SMSD-1 FRS Pension Plan
Senior Management Service Class Designated Position Form 
- SRC-001 Florida Retirement System
Petition for Administrative Hearing before the State Retirement
Commission








III. FORMS OF THE BUREAU OF RETIREMENT CALCULATIONS

Form Number	Title/ Subject of Form
BVR-1	Florida Retirement System Request for Proof of Age (Birth Verification Form) 
DP-11	FRS Pension Plan Application for Service Retirement and the Deferred Retirement Option Program (DROP) 
DP-ELE	FRS Pension Plan Notice of Election to Participate in the Deferred Retirement Option Program (DROP) and Resignation of Employment 
DP-EXT	FRS Pension Plan Extension of Deferred Retirement Option Program (DROP) for Specified K-12 Instructional Personnel 
DPR-100	Florida Retirement System Certification of Salaries 
DS-11	State and County Officers and Employees' Retirement System Application for Service Retirement and the Deferred Retirement Option Program (DROP)
DT-11	Teachers' Retirement System Application for Service Retirement and the Deferred Retirement Option Program (DROP) 
ER-TERM	Florida Retirement System Agency Termination Verification for Service Retirements and Health Insurance Subsidy
FC-1	FRS Pension Plan Salary Certification 
FR-9	FRS Pension Plan Information Request 
FR-11	FRS Pension Plan Application for Service Retirement 
FR-23	FRS Pension Plan Notification of Reemployment for Suspension of Retirement Benefits (For Retired Members Only) 
FR-23a	FRS Pension Plan Application to Reactivate Retirement Benefits (For Retired Members Only) 
FR-28	Division of Retirement Pension Plan Application to Purchase Retirement Credit for a Pension Plan Leave of Absence 
FR-30	FRS Pension Plan Verification for In-State or Out-of-State Service Credit 

FR-30a	FRS Pension Plan Out-of-State Employer Request
FRS-110	FRS Pension Plan Option Selection for FRS Members 
FST-110	Florida Retirement System Option Selection for TRS and SCOERS Members 
FST-12	FRS Pension Plan Beneficiary Designation Form (Retired Members Only) 
HIS-IP	Florida Retirement System Application for Health Insurance Subsidy for Investment Plan Members 
HIS-IP-2	Florida Retirement System Health Insurance Subsidy Certification for Investment Plan Members 
IF-11	Institute of Food and Agricultural Sciences Application for IFAS Supplemental Retirement
MF-1	FRS Pension Plan Statement of Military Eligibility 
MF-2	FRS Pension Plan Statement of Military Eligibility to Purchase Military Service under the Out-of-State Provisions of section 121.1115, Florida Statutes 
OSE-1	FRS Pension Plan Eligibility for Out-of-State Credit
PRO-1	FRS Pension Plan (401(a) Plan) Pretax Direct Rollover/Transfer Form 
SA-1	Florida Retirement System Spousal Acknowledgment
SR-11	State and County Officers and Employees' Retirement System Application for Service Retirement
TR-11	Teachers' Retirement System Application for Service Retirement
TR-4	Florida Retirement System Verification of Out-of-State Teaching Service
WC-1	Florida Retirement System Certification of Workers' Compensation 

IV. FORMS OF THE BUREAU OF BENEFIT PAYMENTS



A. DISABILITY DETERMINATION

Form Number	Title/Subject of Form
FC-1	FRS Pension Plan Salary Certification 
FR-13	FRS Pension Plan Application for Disability Retirement 
FR-13a	Florida Retirement System Statement of Disability by Employer 
FR-13b	Florida Retirement System Physician's Report 
FR-13e	Florida Retirement System Retiree's Report of Continuing Disability
FR-13f	Florida Retirement System Physician's Report of Reexamination
FRS-11o	FRS Pension Plan Option Selection for FRS Members 
FST-12	FRS Pension Plan Beneficiary Designation Form (Retired Members Only) [Note: Includes DROP participants] 
PR-11o	Florida Retirement System Investment Plan Option Selection for FRS Members
PR-13	Florida Retirement System Investment Plan Application for Disability Retirement 
SB-13b	FRS Pension Plan Physician's Report (Disability Determination for Joint Annuitant)
SR-13	State and County Officers and Employees' Retirement System (SCOERS) Application for Disability Retirement
SR-13a	State and County Officers and Employees' Retirement System (SCOERS) Member's Statement of Disability by Employer
SR-13b	State and County Officers and Employees' Retirement System (SCOERS) Physician's Report
SR-13e	State and County Officers and Employees' Retirement System (SCOERS) Retiree's Report of Continuing Disability
SR-13f	State and County Officers and Employees' Retirement System (SCOERS) Physician's Report of Reexamination
SRA-1	FRS Pension Plan Service Retirement Agreement



SRC-001	Florida Retirement System Petition for Administrative Hearing before the State Retirement Commission
TR-13	Teachers' Retirement System Application for Disability Retirement
TR-13a	Teachers' Retirement System Statement of Disability by Employer
TR-13b	Teachers' Retirement System Physician's Report
TR-13e	Teachers' Retirement System Retiree's Report of Continuing Disability
TR-13f	Teachers' Retirement System Physician's Report of Reexamination

B. SURVIVOR BENEFITS


Form Number	Title/Subject of Form
AAPS	FRS Pension Plan Affidavit Attesting to Payee Status
BVR-1	Florida Retirement System Request for Proof of Age (Birth Verification Form) 
DIS-1	FRS Pension Plan Disclaimer of Benefits (Surviving Beneficiary)
DIS-2	FRS Pension Plan Disclaimer of Benefits (Surviving Child)
DIS-3	FRS Pension Plan Disclaimer of Benefits (Surviving Beneficiary and Child)
DOCEV	FRS Pension Plan Explanation of Documentary Evidence
DP-12	FRS Pension Plan Beneficiary Designation Form for the Alternate Payee of a DROP Participant
DROLL	FRS Pension Plan Beneficiary Direct Rollover Election Form
FC-1	FRS Pension Plan Salary Certification 
FR-30b	FRS Pension Plan Verification for In-State or Out-of-State Service Credit
FRS-11o	FRS Pension Plan Option Selection for FRS Members 

FST-11b	FRS Pension Plan Application of Beneficiary for Monthly Retirement Benefits
FST-11g	FRS Pension Plan Application of Beneficiary for Benefit Payment
FST-11so2	Florida Retirement System Application for Survivor Benefits
FST-12	FRS Pension Plan Beneficiary Designation Form (Retired Members Only) [Note: Includes DROP participants] 
JA-1	FRS Pension Plan Change of Joint Annuitant Form (Retired members only)
JA-NUL	FRS Pension Plan Joint Annuitant Nullification Form
JAD-SB	FRS Pension Plan Joint Annuitant Information
MF-1	FRS Pension Plan Statement of Military Eligibility 
SB-13b	FRS Pension Plan Physician's Report (Disability Determination for Joint Annuitant)
SRF-2	FRS Pension Plan Student Report Form
SRF-3	FRS Pension Plan Authorization for Release of Information
SVF-1	FRS Pension Plan Student Verification of Enrollment by Institution
SVF-2	FRS Pension Plan Affidavit Attesting to Eligibility
TAXPREF	FRS Pension Plan Special Notice Regarding Plan Payments (information on rollovers)
TR-11c	Teachers' Retirement System Application for Survivor Benefits








C. RETIRED PAYROLL

Form Number	Title/Subject of Form
1099-R	FRS Pension Plan Information for Reporting Taxes on Retirement Income [Income Tax Reporting Form of the Internal Revenue Service]
ADDCH-1	Florida Retirement System Mailing Address Change Request (Retirees Only) 
HIS-1	Florida Retirement System Health Insurance Subsidy Certification Form
HISBAL	Florida Retirement System Certification of Retirees 2003 Health Insurance Premium Payments
IDAF	Florida Retirement System Insurance Deduction Authorization Form
RAS	Florida Retirement System Retiree Annual Statement
Rollover	Florida Retirement System Direct Rollover Election Form
W-4P	Florida Retirement System Withholding Certificate for Pension Payments 

D. DROP TERMINATION AND REFUND PAYMENT

Form Number	Title/Subject of Form
DP-JOINT	Florida Retirement System Deferred Retirement Option Program (DROP) Joint Annuitant Verification
DP-PAYT	Florida Retirement System Deferred Retirement Option Program (DROP) Selected Payout Method
DP-TEOC	Florida Retirement System Deferred Retirement Option Program (DROP) Elected Officers' Termination Notification
DP-TERM	Florida Retirement System Deferred Retirement Option Program (DROP) Termination Notification
DP-VOID	FRS Pension Plan Deferred Retirement Option Program (DROP) Void Form
FRS-M81	Florida Retirement System Request for Refund 

V. FRS INVESTMENT PLAN FORMS¹

Form Number	Title/Subject of Form
CP-1	FRS Investment Plan How to File a Complaint under the FRS Investment Plan 
ETF-2	FRS Investment Plan Employment Termination Form 
HIS-IP	Florida Retirement System Application for Health Insurance Subsidy for Investment Plan Members 
HIS-IP-2	Florida Retirement System Health Insurance Subsidy Certification for Investment Plan Members 
IPBEN-1	FRS Investment Plan Beneficiary Designation Form 
IPBI	FRS Investment Plan Death Benefit Distribution Instructions and Options 
IPDB	FRS Investment Plan Death Benefit Distribution Claim 
IPDF	FRS Investment Plan Age 70-1/2 Distribution Form 
IPRO-1	FRS Investment Plan Employee Rollover Deposit Form 
Notice	FRS Investment Plan Special Tax Notice Retirement Savings and Stock Ownership Plan Payments 

¹ Except for Forms HIS-IP and HIS-IP-2 (see Page 17-5), investment plan forms listed on this page are forms of the Florida State Board of Administration and are available online only.

